# COPD CARE USER GUIDE - BLUEBAYCT

June 2012

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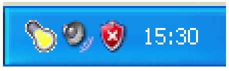
# DOWNLOADING COPD CARE

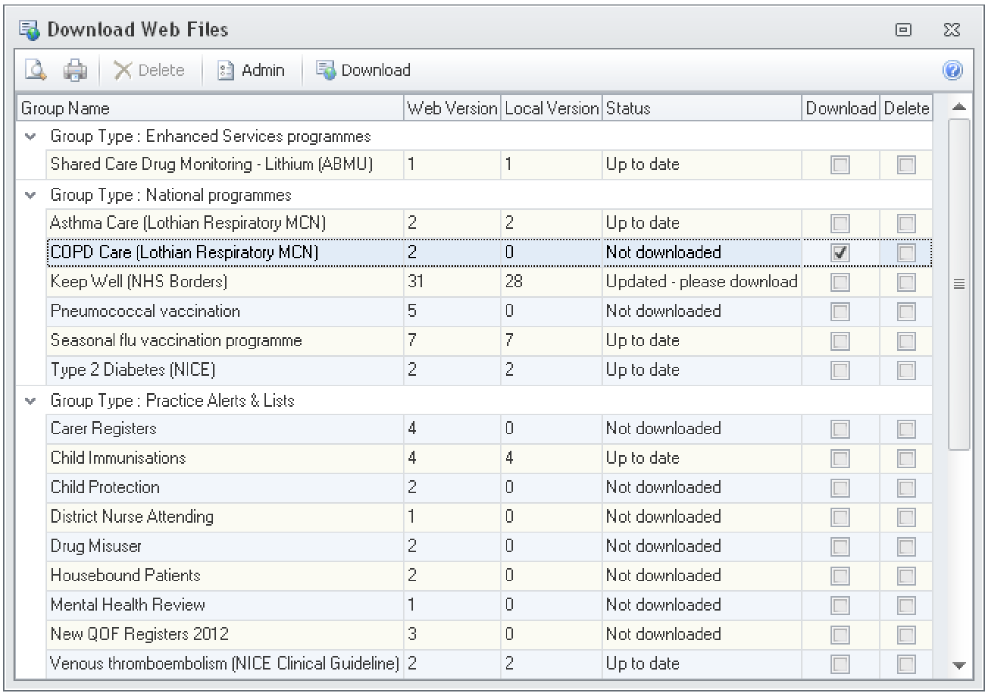
You  will need to download the COPD Care software into your system to enable all of the functionality. BlueBayCT has a dedicated tool that allows you to easily do this, without the fuss of having to download and install it manually.

To download the COPD Care software, do the following:

1. Make sure that BlueBayCT is in **Practice Mode** (no open encounters).
2. In the notification area of the Windows taskbar, right-click the BlueBayCT light bulb icon.




3. From the menu, choose **Download Web Files**.




The **Download Web Files** screen shows all the available solutions that you can add into your BlueBayCT software. These items may include Enhanced Services, National Health Programs, Clinical Guidelines, and other useful additions to the QOF tools. Each practice within a Health Board may have a different list of items in the **Download Web Files** screen, depending on whether or not they are granted access from their software licence.

4. In the **Download Web Files** list, select the **Download** check box for **COPD Care (Lothian Respiratory MCN)**, listed under **Group Type: National Programmes**.
5. Click **Download** on the Toolbar.

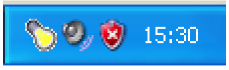
You'll be able to use the downloaded COPD Care software immediately after the download is complete. If anyone else at the practice also requires the use of the COPD Care software, they will first need to restart their BlueBayCT software.

# CHANGING YOUR SETTINGS

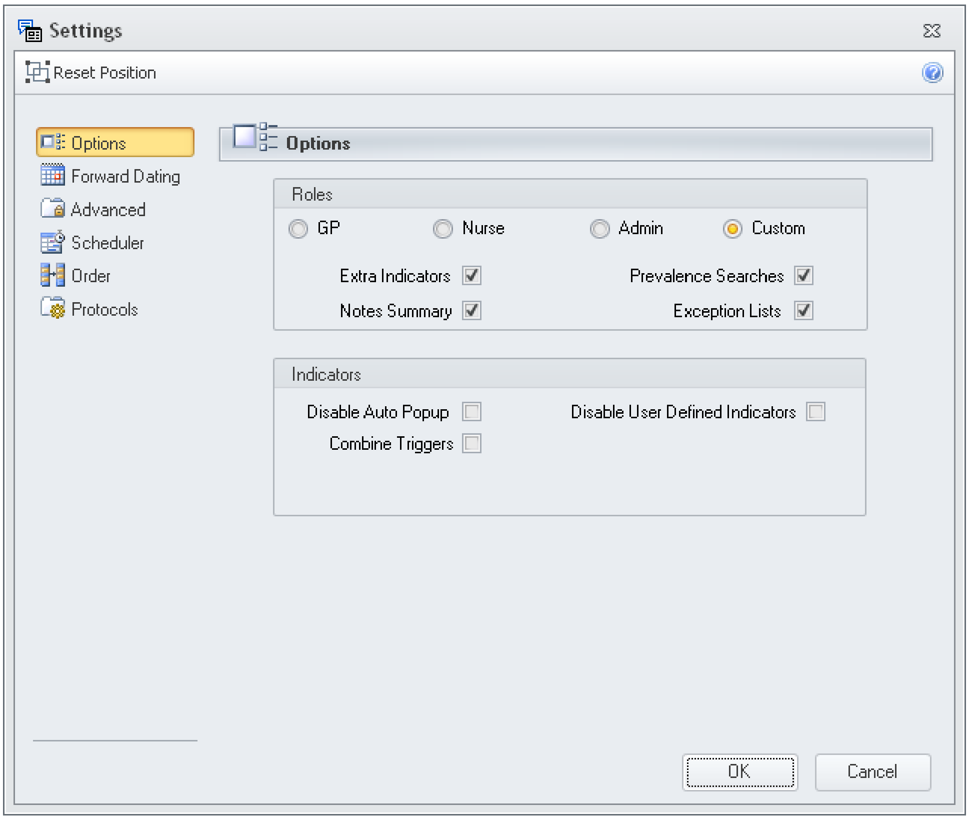
In order to use the full functionality of the COPD Care software, you will need to check your BlueBayCT settings to ensure the software is configured correctly.

To configure BlueBayCT to use the COPD Care software, use the following steps:

1. In the notification area of the Windows taskbar, right-click the BlueBayCT light bulb icon.




2. From the menu, choose **Settings**.



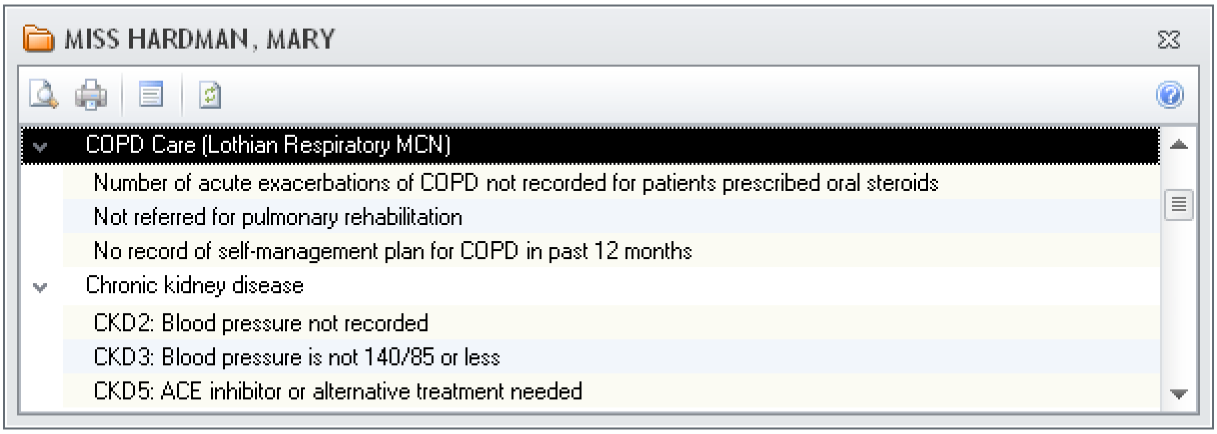

3. On the **Settings** screen, clear the **Disable User Defined Indicators** checkbox.

This will result in additional popup alerts appearing during the patient encounter which are non-QOF related, such as those for COPD Care health checks. Any other solutions downloaded using the **Download Web Files** tool will also appear in the additional popup alerts box. You can switch between the QOF, and non-QOF alerts by clicking the **QOF** and **OTH** buttons on the BlueBayCT Toolbar (if this has been made visible).

If you would prefer to have all QOF and non-QOF related alerts appearing in the same alerts box, you can select the **Combine Triggers** checkbox in the **Settings** screen. The **QOF** and **OTH** buttons are then replaced with an **ALL** button on the BlueBayCT Toolbar.

## USE POPUP ALERTS TO IDENTIFY PATIENTS

When you open a patient encounter in your system, BlueBayCT will check the demographics and clinical history to determine whether the patient is eligible for a COPD Care review. If the patient is eligible, a popup alert will appear to notify you (providing that the Combine Trigger option is selected).




This helps with opportunistic screening, as well as making sure that the patient is suitable for health check. From the popup alert, you can open the **COPD Care** screen and carry out the screening for the patient.

To open the **COPD Care** screen, do one of the following:

- Double-click any of the three Alert Indicators within the **COPD Care (Lothian Respiratory MCN)** category.
- Click the **COPD Care (Lothian Respiratory MCN)** category alert and on the Toolbar, click the **Show Template** button ( ) .
- Right-click any of the three Alert Indicators within the **COPD Care (Lothian Respiratory MCN)** category and from the menu, choose **Show Template**.

# CREATE A CALL/RECALL LIST TO IDENTIFY PATIENTS

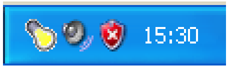
The most frequently used method of identifying your patients who are eligible for COPD Care is by creating a call/recall list. This will show you ALL of the eligible patients and allow you to manage their invitation status for screening using the other COPD Care tools.

From the list, you can do one or more of the following:

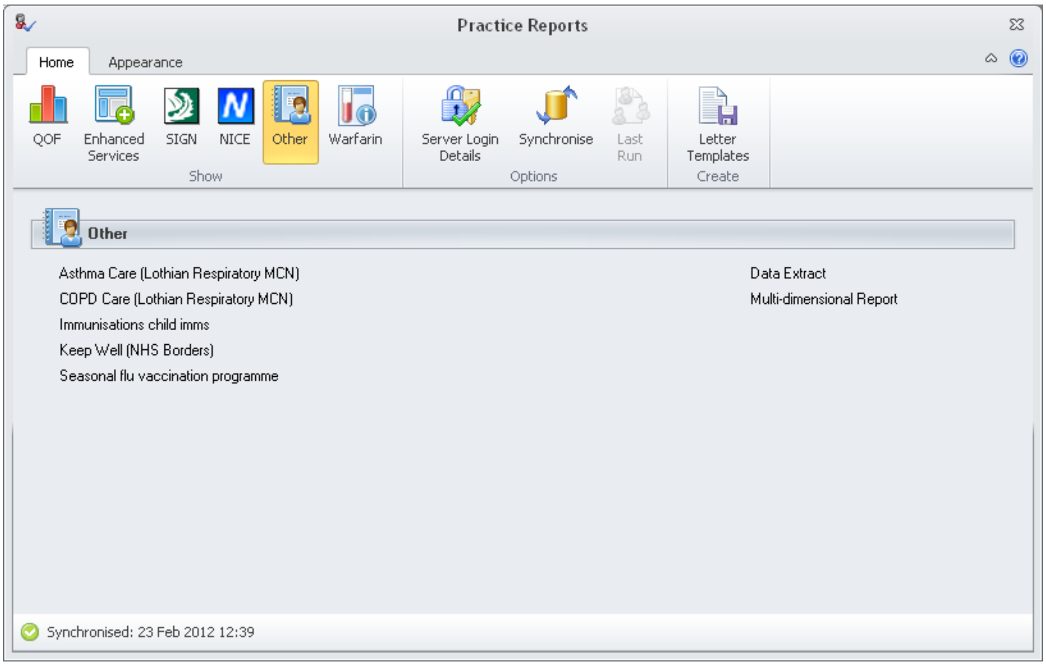
- Generate a printed report of all eligible patients for a COPD Care health check
- Produce invitation letters for the target population
- View information that has already been recorded for each COPD Care screening
- Record other invitation methods for eligible patients

To create a call/recall list, use the following procedure:

1. Make sure that BlueBayCT is in **Practice Mode** (no open encounters).
2. In the notification area of the Windows taskbar, right-click the BlueBayCT light bulb icon.



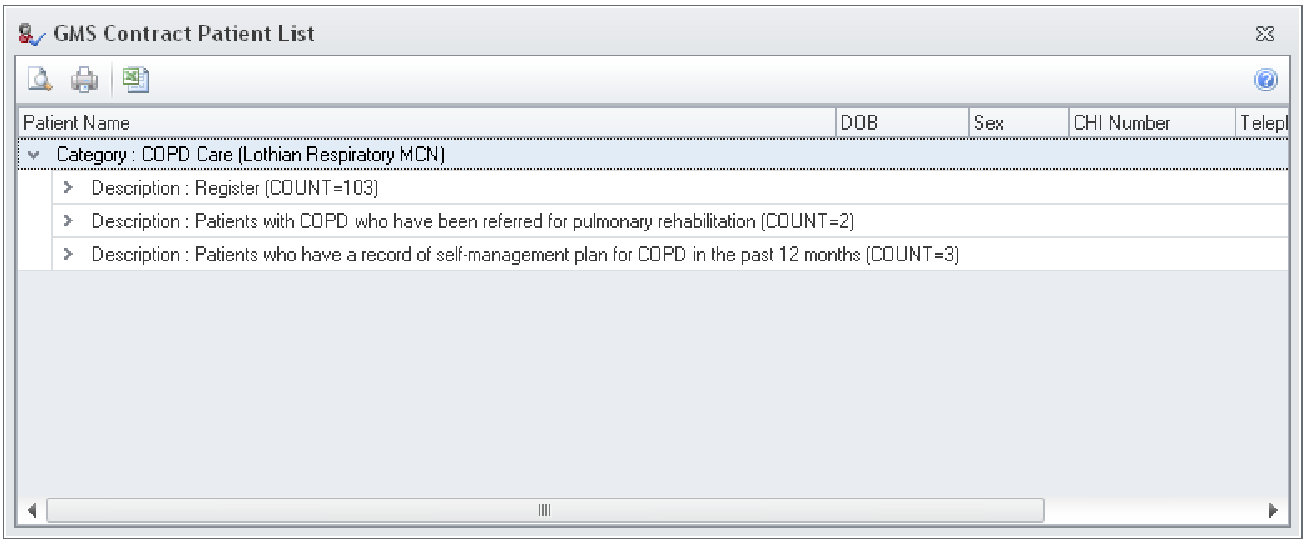

3. From the menu, choose **Practice Reports**.
4. On the **Practice Reports** screen, click the **Other** button on the Toolbar.




5. Click **COPD Care (Lothian Respiratory MCN)**.

If you are a split practice who share the same clinical database, you will first need to choose the required practice from the **Practice Name** list.

The report should take between two and ten minutes to complete.




When finished, you'll see a number of different reports that have been created for you. You can view the patients included in any of these reports by clicking on the **Expand** button ( ).

The identification report is at the top of the report list and is titled **COPD Care (Lothian Respiratory MCN)**.

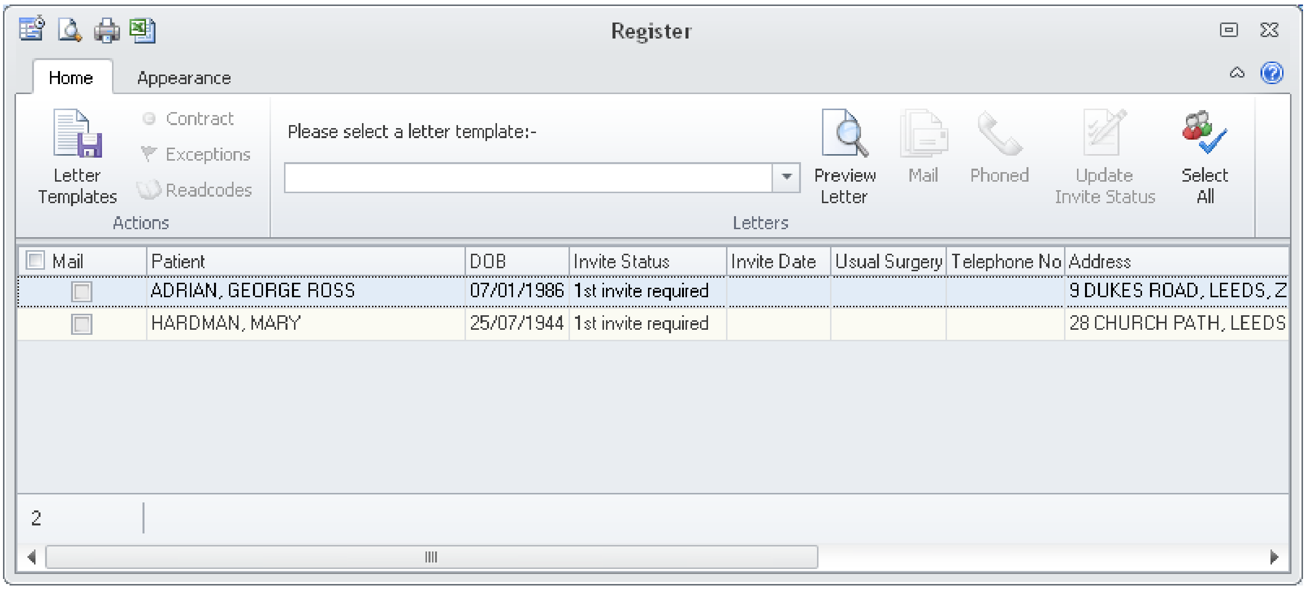
# PRODUCE INVITATION LETTERS FOR TARGET POPULATION

It's easy to produce invitation letters for your identified COPD Care target population using BlueBayCT 's mail merge tools. BlueBayCT will automatically track the letters that you send to each patient, along with any other recall methods that you use, and keep a history of engagement methods in the COPD Care screen.

To generate invitation letters, do the following:

1. On the Patient List screen, right-click the **Register** list.
2. From the Toolbar, choose **Merge Indicator**.

This will launch the **Merge** screen.




The **Merge** screen is designed to help you manage your screening invitations and includes important information such as the **name** of the Patient, the patient's **DOB**, the **Usual Surgery** they attend (or branch surgery, if any), and **Telephone No**. You can also see the patient's invitation status in the **Letter Level** column. Filters can be applied to each column allowing you to reduce the number of patients on the list. For example, you may want to only show those patients who have an invite status of **Send 1st Letter**. You can apply a filter by clicking on the column heading and selecting a filter button ( ) at the top of each column and choosing an entry from the list, or choosing custom.

Each patient in the list has a checkbox which includes or excludes them from invitation. On the Toolbar, you'll find various options for selecting the appropriate letter, generating letters and recording other invitation methods.

3. Do one of the following:
   - Select the **Mail** checkbox for each patient you want to include in your invite.
   - On the Toolbar, click **Select All** to select all the patients.
4. Choose the required letter invitation letter from the **Letter Templates** list.
5. Click the **Preview Letter** button on the Toolbar.

   A sample invitation letter will be generated using Microsoft Word™ allowing you to check the format and spacing of the invitation letter before you continue with the patient mail merge and update.
6. Click the **Mail** button on the Toolbar.

The mail merge process will begin and invitation letters generated using Microsoft Word™. If you have a lot of patients on your merge list, you'll see a progress bar appear at the bottom of the window. This is used to indicate how much time it takes to update each patient with the appropriate Read code. When the update is complete, you'll notice that the invitation status in the **Letter Level** column has changed.

Invitation letters are stored on the practice server for easy retrieval within the practice, just in case you need to re-print because of a printer jam or if you've lost the letters. Letters are stored on the server in the **NetworkShare** directory. The exact location of merged letters is: -

***servername*\NetworkShare*practicecode*\Letters**

(Where ***servername*** is replaced by the name of your practice server, and ***practicecode*** is replaced by your practice code.)

# RECORDING TELEPHONE INVITATIONS

To record a telephone invite for a COPD Care patient from the patient list, do the following:

1. On the Patient List screen, right-click the **COPD Care (Lothian Respiratory MCN)** list.
2. From the menu, choose **Merge Indicator**.

This will launch the **Merge** screen.

3. Select the **Mail** checkbox for the patient you want to phone.
4. On the Toolbar, click the **Phoned** button.
5. Click **OK** to confirm that the selected patients have been verbally invited by phone.

This will update the patient's invite status in the Letter Level column, as well as adding an appropriate Read code to the patient's clinical record.

# USING THE COPD CARE SCREEN

BlueBayCT 's COPD Care solution includes a COPD Care template screen that you can use to record and look up all the different types of information required for the review. As well as being able to add new items of information, you can also view a detailed clinical history for the patient. All information recorded using the COPD Care screen is filtered back into your clinical system and updated into the relevant areas within your clinical system.

## VIEWING AND RECORDING INFORMATION

Each item within the COPD Care screen is designed to let you view historical information in chronological order. This means you will not have to use the clinical system to search for the information you need. It's all been conveniently collated for you into the screen so that you can easily access it.

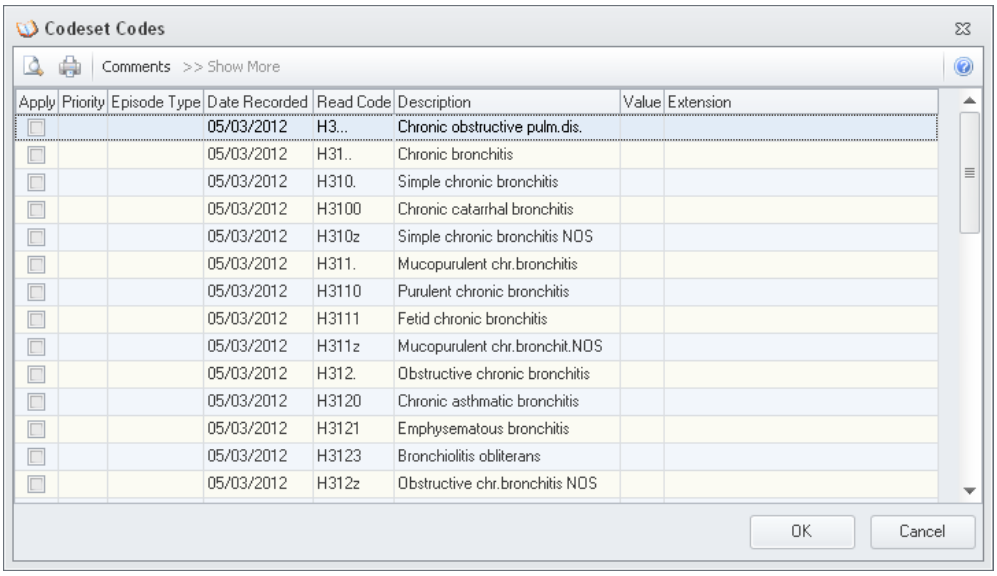
To view historical information for any item on the COPD Care screen, click the **History** button ( ). This will show you all the entries for the item from the patient's clinical record, with dates, values, extension entries. If you are viewing the history for items with values or measurements, the history will also display a chart showing trends for the item.

For the majority of the items in COPD Care screen, you'll also be able to record information in these fields. How you enter the data might differ, depending on the type of information in the field. In most cases, the method of recording the information will be by selecting a Read code from a picking list.

To record information using the Read code list, do the following:

1. For the item you want to record, click the **Codeset** button ( ).

This will display the **Codeset** screen with the list of available Read codes.




| Apply | Priority | Episode Type | Date Recorded | Read Code | Description | Value | Extension |
|---|---|---|---|---|---|---|---|
| | | | 05/03/2012 | H3... | Chronic obstructive pulm.dis. | | |
| | | | 05/03/2012 | H31.. | Chronic bronchitis | | |
| | | | 05/03/2012 | H310. | Simple chronic bronchitis | | |
| | | | 05/03/2012 | H3100 | Chronic catarrhal bronchitis | | |
| | | | 05/03/2012 | H310z | Simple chronic bronchitis NOS | | |
| | | | 05/03/2012 | H311. | Mucopurulent chr.bronchitis | | |
| | | | 05/03/2012 | H3110 | Purulent chronic bronchitis | | |
| | | | 05/03/2012 | H3111 | Fetid chronic bronchitis | | |
| | | | 05/03/2012 | H311z | Mucopurulent chr.bronchit.NOS | | |
| | | | 05/03/2012 | H312. | Obstructive chronic bronchitis | | |
| | | | 05/03/2012 | H3120 | Chronic asthmatic bronchitis | | |
| | | | 05/03/2012 | H3121 | Emphysematous bronchitis | | |
| | | | 05/03/2012 | H3123 | Bronchiolitis obliterans | | |
| | | | 05/03/2012 | H312z | Obstructive chr.bronchitis NOS | | |

2. Select the **Apply** checkbox for the code that you want to use.

If you require more than one Read code, select the **Apply** checkbox for each one. If the Read code you want to record does not appear in the list, try clicking the **Show More** button. By default, only the most commonly used codes are displayed.

3. Do one or more of the following, if required:

   • Change the **Priority** for the Read code by choosing a new one from the list.

   • Change the **Date Recorded** from the default of today's date. This is useful when you need to backdate information.

   • Type a **Value** for any readings, measurements or scores. It's important to make sure that these are numeric values only, so that the information is stored correctly within the clinical system.

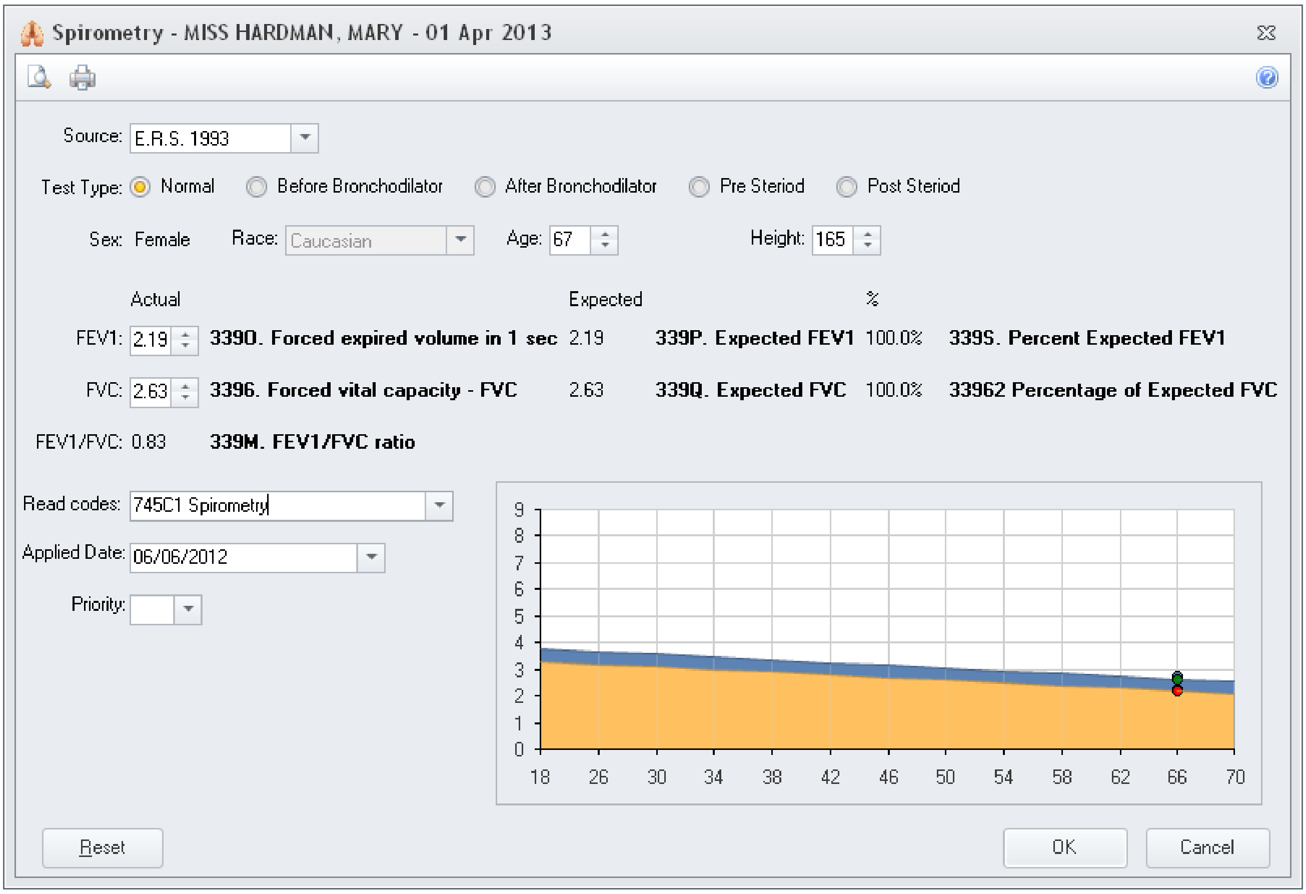
   • Type any free text entries in the **Extension** box, or pick a pre-defined entry from the list.

4. Click **OK** to enter the Read code(s) into the COPD Care screen.

If you have made a mistake and would like to remove the Read codes you have entered, click the Undo button ()

## SPIROMETRY CALCULATOR

The Spirometry Calculator is used to record actual spirometry values and calculate what would be expected for the patient, based on their Sex, Age, Race and Height.  The FEV1/FVC ratio is also calculated.   The Spirometry screen will appear, as shown below.



To use the Spirometry screen do the following:-

1. In the **COPD Care** template, click the Spirometry button (  ).
   This will launch the Spirometry calculator tool.
2. Choose a suitable reference Source from the drop down box. The three choices are **E.R.S. 1993**, **Hankinson 1999** and **Knudson 1976**. The reference source selected affects which Read codes are used.
3. Choose the **Test Type** from the five different options. The Test Type is essentially which stage the test was performed at.
4. The patients Sex, Race, Age and Height are automatically extracted from the patients notes. The **Age** and **Height** can be altered on the screen (doing so does NOT alter them in the patients record).
5. Enter the **FEV1** and **FVC** values into the relevant boxes. The expected values can been seen along side, along with the expected percentage values, and the FEV1/FVC ratio.

All the relevant Read codes that will be added are displayed, and the data is plotted on the graph.

6. Select a **Read code** from the drop down list**.**
7. Change the **Applied date** and **Priority** if necessary.
8. Click **OK** to save.

# HOW TO ACCESS THE COPD CARE SCREEN

There are a number of different ways to access the COPD Care Screen and how you do this will generally depend on what you want to use it for. For example, you will most likely use it during an encounter with the patient to carry out a health check, or when working on the call/recall list.

## ACCESS THE COPD CARE SCREEN FROM A POPUP ALERT

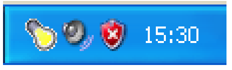
The easiest way to access the COPD Care screen is from the popup alert that appears during the patient encounter. Simply double-click on the alert, and the COPD Care template screen will open.

## ACCESS THE COPD CARE SCREEN FROM THE BLUEBAYCT MENU

The BlueBayCT menu provides quick access to all features within the software, including the COPD Care screens.

To access the COPD Care screen from the BlueBayCT menu, use the following procedure:

1. Whilst in the patient clinical record, right-click the BlueBayCT light bulb icon in the Notification Area of your Windows taskbar.




2. On the menu, choose **Clinical Templates**, and then click **COPD Care (Lothian Respiratory MCN)**.

## ACCESS THE COPD CARE SCREEN FROM THE CALL/RECALL LIST

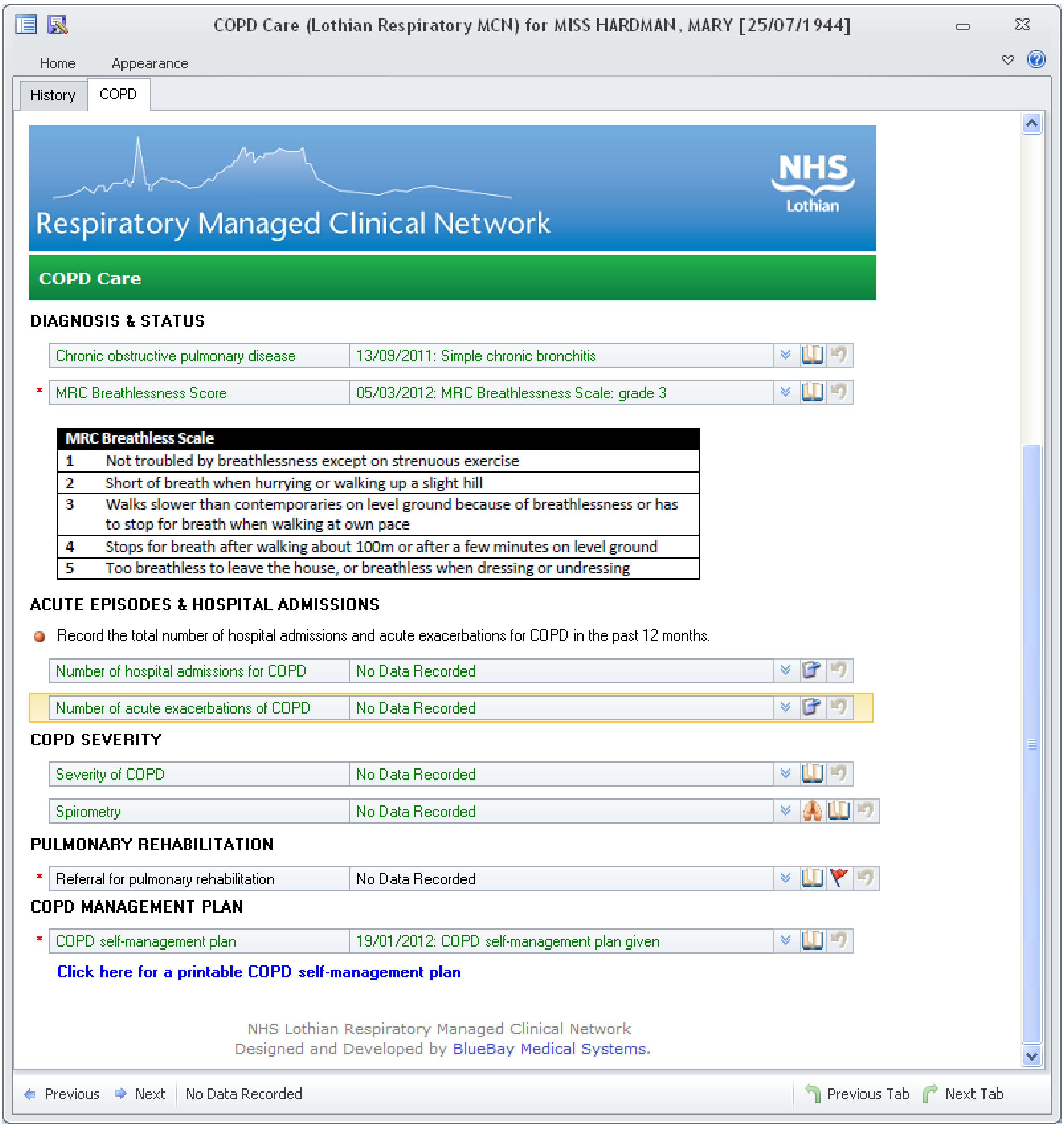
When using the call/recall list for COPD Care, you can open the COPD Care template screen to record or view clinical information for the patient. Please note however, that any information that you record from the call/recall lists are not assigned to a specific staff member but are recorded as 'Data Entry' for the **Admin** user.

To open the COPD Care template screen from the patient list, do the following:

1. In the Patient List, right-click on the name of the patient that you want to open the COPD Care screen for.
2. From the menu, choose **Show Template**.

# COPD CARE TEMPLATE

The **COPD** tab within the COPD Care template screen is used to record and display the patients COPD relevant information.




## DIAGNOSIS & STATUS

- **Chronic obstructive pulmonary disease** - use this field to view or record information about any COPD diagnosis the patient has had.
- **MRC Breathlessness Score** - use this field to view or record the severity using the MRC Breathlessness Scale.

## ACUTE EPISODES & HOSPITAL ADMISSIONS

- **Number of Hospital Admissions for COPD** - use this field to view and record the number of COPD related hospital admissions in the last 12 months.
- **Number of Acute Exacerbations of COPD** - use this field to view and record the number of acute exacerbations of COPD in the last 12 months.

## COPD SEVERITY

- **Severity of COPD** – use this field to view and record the severity of the COPD.
- **Spirometry** – use this tool to calculate spirometry values.

## PULMONARY REHABILITATION

- **Referral for pulmonary rehabilitation** – use this field to view and record the referrals for pulmonary rehabilitation.

## COPD MANAGEMENT PLAN

- **COPD self-management plan** – use this field to view and record if the patient has been given a self-management plan.

CAUTION *The bottom part of the template, which includes all fields below the MRC Breathlessness score, will be greyed out and will not allow data entry until a MRC Breathlessness score of Grade 3 or above is recorded.*

## SAVING THE INFORMATION

When you have finished using the COPD Care screen, click the **Save & Close** button on the Toolbar. This will store the information within the clinical record in the clinical system. You must make sure you save when exiting the clinical system to save this information in the patient record.

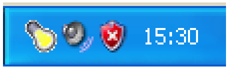
# DATA EXTRACT

## RUNNING DATA EXTRACT MANUALLY

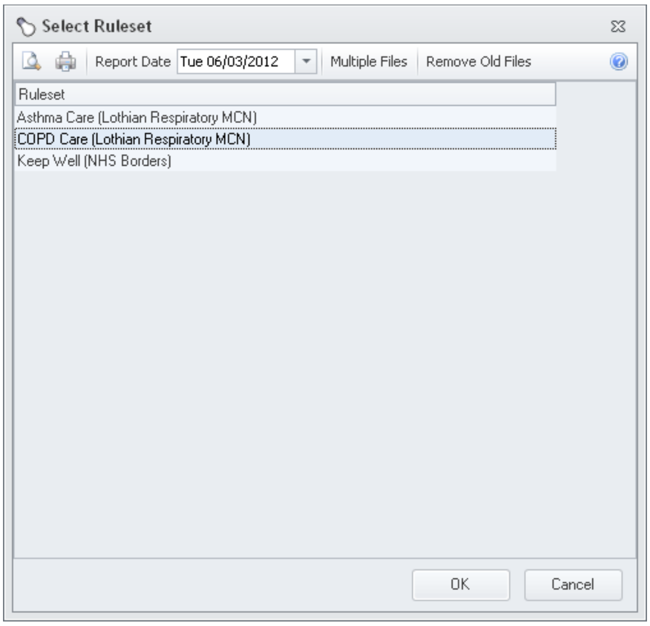
The COPD Care solution includes a facility to extract anonymised patient clinical data into a CSV file, which can then be used by your Health Board to compile statistical information and to verify any related payments for Enhanced Services. Your Health Board may require this to be sent via email, or they will be able to collect the file remotely.

To access the Data Extract screen and produce a data extract file manually, do the following:-

1. Make sure that BlueBayCT is in **Practice Mode** (no open encounters).
2. In the notification area of the Windows taskbar, right-click the BlueBayCT light bulb icon.



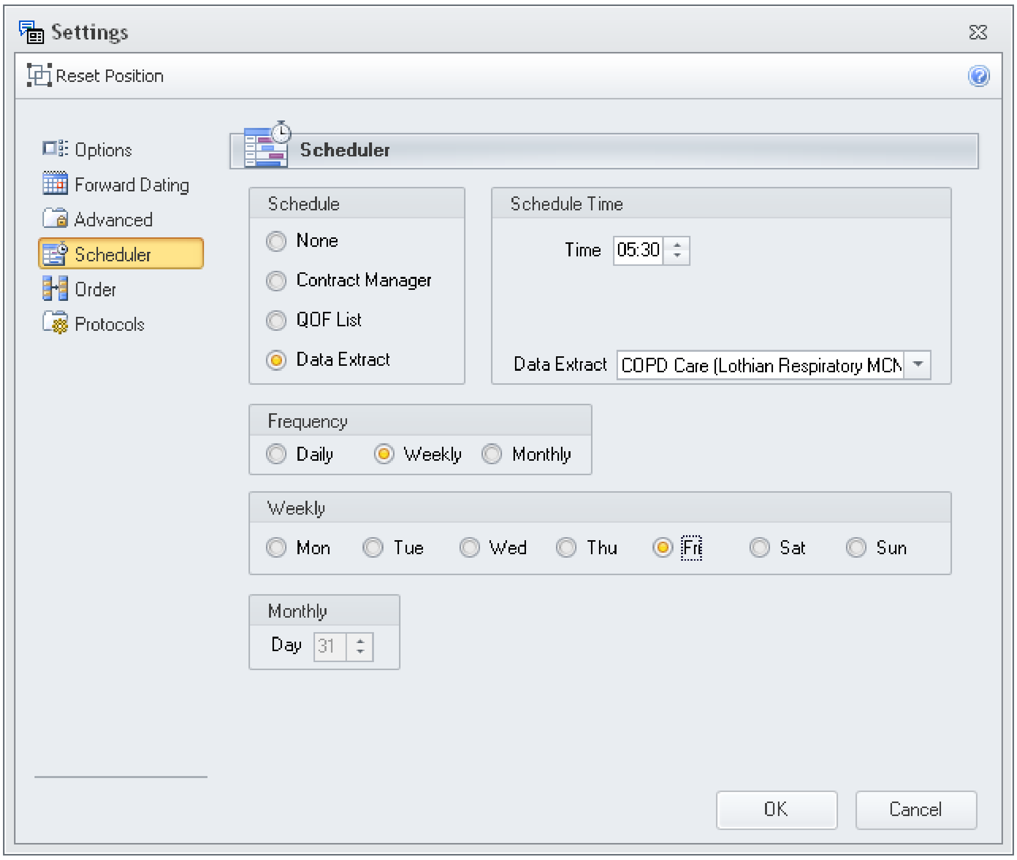

3. From the menu, choose **Practice Reports**.
4. On the Practice Reports screen, left-click on the **Other** tab on the toolbar, and select **Data Extract**.




5. From the Select Ruleset window, choose **COPD Care (Lothian Respiratory MCN)**.
6. Change the Report Date by selecting a new date from the drop down box or typing it directly into the box if you want to run the Data Extract based on a date in the past.
7. Left-click the **Multiple Files** option to toggle it if you wish to get a CSV file for each column that has been defined.
8. The location of the data extract file is then displayed, and by clicking on **Folder** it will take you to the relevant location.  The data extract file can then be viewed by the practice and collected remotely by the Health Board as necessary.

## RUNNING DATA EXTRACT AUTOMATICALLY VIA THE SCHEDULER TAB

The Scheduler tab can be used to schedule the running of the Data Extract. This is particularly useful if you want to run it at a more convenient time, or you are unable to run it during the day.




To schedule the running of the COPD Care Data Extract use the following method:-

1. Right-click the Light Bulb icon ( ) on the Notification area of the Windows Taskbar.
2. From the popup menu, left-click **Settings**.
3. In the Schedule option list, left-click **Data Extract** and select the report you wish to extract from the Data Extract drop down menu.
4. In the Frequency option list, choose one of the following:-
    - **Daily** – Schedule the task to run every day.
    - **Weekly** - Schedule the task to run on a specific day of the week.
    - **Monthly** - Schedule the task to run on a specific day of the month.
5. In the Weekly option list, choose the required day of the week, if the Weekly option was selected in step 4.
6. In the Monthly option list, choose the required day of the month, if the Monthly option was selected in step 4.

7. In the Schedule Time box, enter the time that you want the schedule to start in 24hr format, and select the report you wish to extract from the Data Extract drop down menu.

8. Left-click **OK** to set the schedule.

9. The location of the data extract file is then displayed, and by clicking on **Folder** it will take you to the relevant location. The data extract file can be viewed by the practice and collected remotely by the Health Board as necessary.

*After the scheduler has been set to run, you will need to leave the PC running at the time specified. It is not necessary to be logged into your clinical system, but it does require that the PC be left on with BlueBayCT running.* ***The data extract is Anonymised*** *and no patient identifiable data is held within the extract. The extract is stored in NetworkShare\PracticeCode\Extract folder.*